

# 2019-2020 Verification Worksheet - Independent Household Information & Tax Filing Status



Your Free Application for Federal Student Aid (FAFSA®) was selected for review in a process called Verification, which requires our office, per federal law, to compare your FAFSA® results with required acceptable documentation. Our office may ask for additional documentation to resolve conflicting information in addition to this Worksheet. In our review, if there are differences our office will submit the corrections back to the federal processor and you will receive an updated FAFSA® reflecting the corrections. If you have questions about Verification, contact our office as soon as possible so that your financial aid will not be delayed.

## STEP 1 - STUDENT INFORMATION

**PLEASE PRINT LEGIBLY**

Last Name	First Name	M.I.	WPU ID Number	Date of Birth
Phone Number (include area code)		Email address (primary contact method)		

## STEP 2 - FAMILY HOUSEHOLD INFORMATION

**As of today, what is the student's marital status? Choose one box below.**

- Single, Never Married (report only student information)
- Married/Remarried\* since MM/YYYY: \_\_\_\_\_ (report information for you and your current spouse)
- Divorced/Widowed/Separated\* since MM/YYYY: \_\_\_\_\_ (report only student information)

\*If your marital status has changed since December 31, 2017, you will not be able to use the IRS Data Retrieval/Link to IRS in the FAFSA® and must submit a **tax return transcript** and copies of your W2 forms to complete the tax return verification.

List the people in your household including:

- **Yourself and your spouse if applicable, and**
- Your or your spouse's children, if you or your spouse will provide more than half of the child(ren)'s support from July 1, 2019 through June 30, 2020, even if a child does not live with you, **and**
- other people if they live with you now, and you or your spouse provides more than half of the other person's support and will continue to provide more than half of that person's support through June 30, 2020.

**Write the names of ALL household members in the space(s) below.** Also write the name of the university for any household member who will be attending university at least half time between July 1, 2019 and June 30, 2020, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship to Student <small>(Spouse, Child, Stepchild, Grandparent, etc.)</small>	University Attending during 2019-2020	Will be Enrolled at Least Half Time (Yes or No)
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		Self	Warner Pacific University	

### STEP 3 - TAX FILING STATUS AND INCOME INFORMATION—CALENDAR YEAR 2017

STUDENT INFORMATION YEAR - 2017	SPOUSE INFORMATION (IF MARRIED) YEAR - 2017	REQUIREMENT
<input type="checkbox"/> I <b>filed</b> a 2017 Federal Income Tax Return ( <b>skip step 4</b> )	<input type="checkbox"/> My spouse filed <b>jointly</b> on my 2017 Federal Tax Return ( <b>skip step 4</b> ) <input type="checkbox"/> My spouse filed a <b>separate</b> 2017 Federal Tax Return ( <b>skip step 4</b> )	<ul style="list-style-type: none"> <li>Use the <b>IRS Data Retrieval Tool/Link to IRS</b> in the FAFSA <b>*OR*</b></li> <li>Order a <b>"Tax Return" Transcript from the IRS</b> <ul style="list-style-type: none"> <li>Mail, Fax, Bring in, or Scan and email the transcript when received</li> </ul> </li> </ul> <p><b>WE CANNOT ACCEPT 1040 TAX RETURN FORMS</b></p>
<input type="checkbox"/> I <b>worked</b> in 2017, but am <b>not required</b> to file a Federal Income Tax Return ( <b>complete step 4</b> )	<input type="checkbox"/> My spouse <b>worked</b> in 2017, but is <b>not required</b> to file a Federal Income Tax Return ( <b>complete step 4</b> )	<ul style="list-style-type: none"> <li>Complete <b>Verification of Income</b> in step 4</li> <li>Provide <b>copies of W2 forms</b> from all employers for 2017</li> <li>Order a <b>Verification of Non-Filing Letter</b> from the IRS using IRS Form 4506-T             <ul style="list-style-type: none"> <li>Mail, Fax, Bring in, or Scan and email the letter when received</li> </ul> </li> </ul>
<input type="checkbox"/> I <b>did not work or earn income</b> in 2017 ( <b>skip step 4</b> )	<input type="checkbox"/> My spouse <b>did not work or earn income</b> in 2017 ( <b>skip step 4</b> )	<ul style="list-style-type: none"> <li>Order a <b>Verification of Non-Filing Letter</b> from the IRS using IRS Form 4506-T             <ul style="list-style-type: none"> <li>Mail, Fax, Bring in, or Scan and email the letter when received</li> </ul> </li> </ul>

Warner Pacific University recommends using the **IRS Data Retrieval Tool/Link to IRS** within the FAFSA® to complete tax return verification for those that filed a 2017 Federal Income Tax Return. If you are unable to, or choose not to use the Data Retrieval Tool, you must obtain and submit a **2017 IRS Tax Return Transcript** to the university through one of the following methods:

- Get Transcript by Mail** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the receipt of the online request.
- Get Transcript Online** – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the Get Transcript Online tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone in the user's name (pay-as-you-go plans cannot be used), and (3) specific financial account numbers (such as a credit card [not a debit card] number or an account number for a home mortgage or auto loan [used to compare against your credit report]). The transcript displays online upon successful completion of the IRS's two-step authentication.
- Automated Telephone Request** – 1-800-908-9946. Transcript is generally received within 10 business days from the receipt of the telephone request.
- Paper Request Form** – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the receipt of the paper request form.

### STEP 4 - THOSE THAT WORKED BUT DID NOT FILE A TAX RETURN

(skip if you filed taxes OR did not earn any income)

Employer's Name	Person Who Earned Income	IRS W-2 Provided?	Total Amount Earned in 2017
<i>(Example) Warner Pacific University</i>	<i>Self</i>	<i>Yes</i>	<i>\$2,300.00</i>
			\$
			\$
			\$
			\$

### STEP 5 - REQUIRED SIGNATURES ON THIS WORKSHEET

Each person signing this form certifies that all the information reported is complete and correct. A hand written signature, not typed, is required. **The student must sign and date. If married, spouse's signature is optional.**

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Spouse Date

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.